



Replacement MMIS Provider User Provisioning (Providers) Participant User Guide

PREPARED FOR:

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1.0 Welcome

1.1 COURSE OVERVIEW

Welcome to the NCTracks Provider User Provisioning training. The new NCTracks Provider Portal has a variety of features to assist in managing provider records and information to more effectively support providers as they service Department of Health and Human Services (DHHS) recipients. One of the features of the new NCTracks Provider Portal is the ability for providers to control the level of access they give to their staff members. Staff members can be granted access based on their area of responsibility. For example, front office staff may need access to recipient eligibility information, but may not be involved with submitting claims.

Every provider will need to identify an Office Administrator to grant staff member access to the NCTracks Provider Portal and its functionality. Access will be based on the staff member's job functions. An Office Administrator can be the Office Administrator for one or more NPIs.

Note: All individuals who access the new system will require an NCID. All Owners and Managing Employees must be reported in order for the individual to be provisioned.

1.2 COURSE BENEFITS

- ❖ The purpose of this training is to teach users how to:
- ❖ Establish an Office Administrator
- ❖ Create users within their office

1.3 COURSE OBJECTIVES

At the end of training, as an authorized Office Administrator, users will be able to do the following:

- ❖ Establish an Office Administrator
- ❖ Access and navigate the User Administration section of the Provider Secure Portal
- ❖ Add, maintain, and delete Provider Groups
- ❖ Add, maintain, and delete Users
- ❖ Disable, enable, and reset users' Electronic Signature PINs

1.4 PREREQUISITES

Before taking this course, it is required that the user first completes the following courses:

- ❖ HIPAA Security & Privacy Training
- ❖ NCTracks Overview (CBT)
- ❖ Office Admin Functions (CBT)

NOTES



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2.0 Establishing the Office Administrator

2.1 INTRODUCTION

The process for establishing the Office Administrator is broken out into two groups:

- ❖ Legacy – which are currently enrolled Providers, and
- ❖ New Providers – any new providers who apply after the NCTracks go-live date

2.2 OBJECTIVES

This training will take the user through the process of navigating through the User Administration section of the Provider Secure Portal in the NCTracks system. The user will work with Provider Groups, Users, and Electronic Signature PIN management.

In this document, each section will have a graphic illustration followed by a **step**. The numbers on the image will correspond with the numbers in the **steps**.

2.3 HELP SYSTEM

The major forms of help in the NCTracks system are as follows: (Refer to Addendum A):

- ❖ System Level Help: Indicated by the “NCTracks Help” link on each page
- ❖ Page Level Help: Indicated by the “Help” link above the Legend
- ❖ Legend
- ❖ Data/Section Group Help: Indicated by a question mark (?)
- ❖ Hover over or Tooltip Help on form elements
- ❖ Navigational Breadcrumbs

NOTES:

2.4 CURRENTLY ENROLLED PROVIDER NCTRACKS REGISTRATION

A “Currently Enrolled Provider” (CEP) NCTracks Registration process has been developed to enable providers to submit this important information prior to go-live. The CEP process can be accessed from the current Enrollment, Verification, and Credentialing website (www.nctracks.nc.gov).

Currently Enrolled Provider NCTracks Registration

This July, the North Carolina Department of Health and Human Services (DHHS) is moving to an entirely new multi-payer processing system for four of its agencies - the Division of Medical Assistance (DMA), the Division of Mental Health, Developmental Disabilities, and Substance Abuse Services (DMH), the Division of Public Health (DPH), and the Office of Rural Health and Community Care (ORHCC).

Legacy MMIS+ providers are required to complete the Currently Enrolled Provider NCTracks Registration Application to provide our new system, NCTracks, with several critically important data elements.

CSC will mail each Legacy MMIS+ provider (one letter per National Provider Identifier [NPI]) an NCTracks Registration Letter that contains your Authorization Code, which is required to complete the Currently Enrolled Provider NCTracks Registration Application. Once you have received the letter, you may submit the registration application.

Note: The letters will be mailed in batches beginning late February 2013. If you have not received your letter by May 1, 2013, please contact the CSC EVC Call Center at 1-866-844-1113 or by e-mail at NCMedicaid@csc.com.

Exhibit 1. Currently Enrolled Provider NCTracks Registration

All currently enrolled DHHS providers will receive a letter giving them specific instructions for completing the “Currently Enrolled Provider” (CEP) NCTracks Registration. The letters will be mailed to providers in waves from March through May, 2013.

This letter provides:

- ❖ Directions for accessing the “Currently Enrolled Provider” NCTracks Registration webpage, and
- ❖ An access code the provider will use to verify their identity when logging into the application
- ❖ A North Carolina Identification (NCID) will also be required to complete the CEP process.

Providers can use this link to access additional CEP information:

https://www.nctracks.nc.gov/provider/providerEnrollment/assets/onlineHelp/cep_101_help.pdf access

NOTES:

2.5 NEW PROVIDERS

As new providers enroll in NCTracks, the Office Administrator completes their enrollment application. After the new provider is approved, the Office Administrator can then establish other users with security access to the Provider Portal.

NOTES:

[illegible]



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3.0 Creating New Groups

3.1 INTRODUCTION

An Office Administrator can be the Office Administrator for one or more NPIs. Users must define at least one Provider Group before adding Administrative Users.

Groups are created to represent logical collections of providers within an organization and can be organized by:

- ❖ Department
- ❖ Specialty
- ❖ Any other custom classification

An example of a group is a large organization, such as a hospital, that has several large departments or locations. Each group represents its own department and/or location. For example, if ABC Hospital has departments such as Urology, Endoscopy, and Pulmonology and locations such as New Bern Avenue, Smith Farm Road, and Falls of Neuse Road.

Before adding any Administrative Users, the user must define at least one Provider Group.

3.2 ACCESSING NCTRACKS

After accessing the NCTracks home page, follow the steps below to access the User Administration screens in the **Secure Provider Portal**.

Home **Providers** **Recipients** **Operations**

1

Home
NCTracks is provided as a service for North Carolina's health care providers and consumers as part of the new, multi-payer Medicaid Management Information System. NCTracks provides easy access to benefit information for recipients and easy-to-use features for providers. The NCTracks system supports electronic processing of various queries and transactions such as recipient eligibility verification, prior approval requests, claims submission, personalized secure email messages, and electronic Remittance Advice reports. NCTracks maximizes state-of-the-art technology to increase the provider's administrative efficiency through paperless processing and other advanced features of the new system.

Providers
NCTracks facilitates provider enrollment and consolidates claims processing activities for multiple DHHS health plans. The secure provider portal allows providers to manage changes, update records, check recipient eligibility, obtain prior approvals, and submit claims including pharmacy claims.

Recipients
NCTracks website offers information and announcements for Medicaid and Health Choice recipients. NCTracks also offers a Secure Recipient Portal where you can check your eligibility status with Medicaid and Health Choice. [read on](#)

Pharmacy
Prior Authorization is required for certain drugs prescribed to N.C. Medicaid and Health Choice Recipients. This website will help prescribers and pharmacists understand pharmacy services provided through public health programs, N.C. Medicaid and N.C. Health Choice. [read on](#)

Exhibit 2. NCTracks Home Page

Step	Action
1	Select the Providers tab.

The **Providers home page** displays.

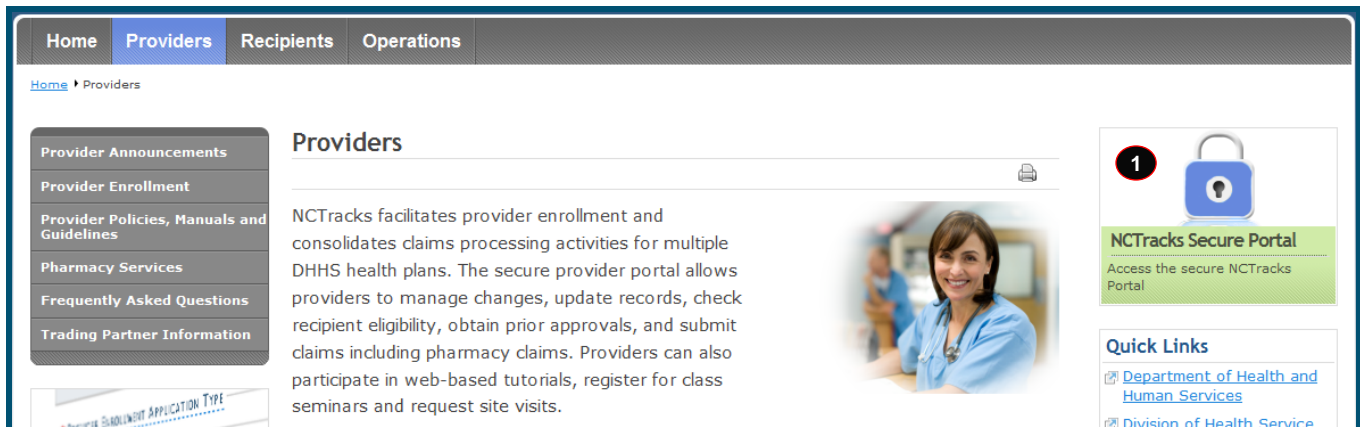


Exhibit 3. Providers Home Page

Step	Action
1.	Select the NCTracks Secure Portal icon.

The **Provider Portal Login** screen displays. **Note:** If a user does not have an NCID, he/she would click the NCID link to request one before continuing.

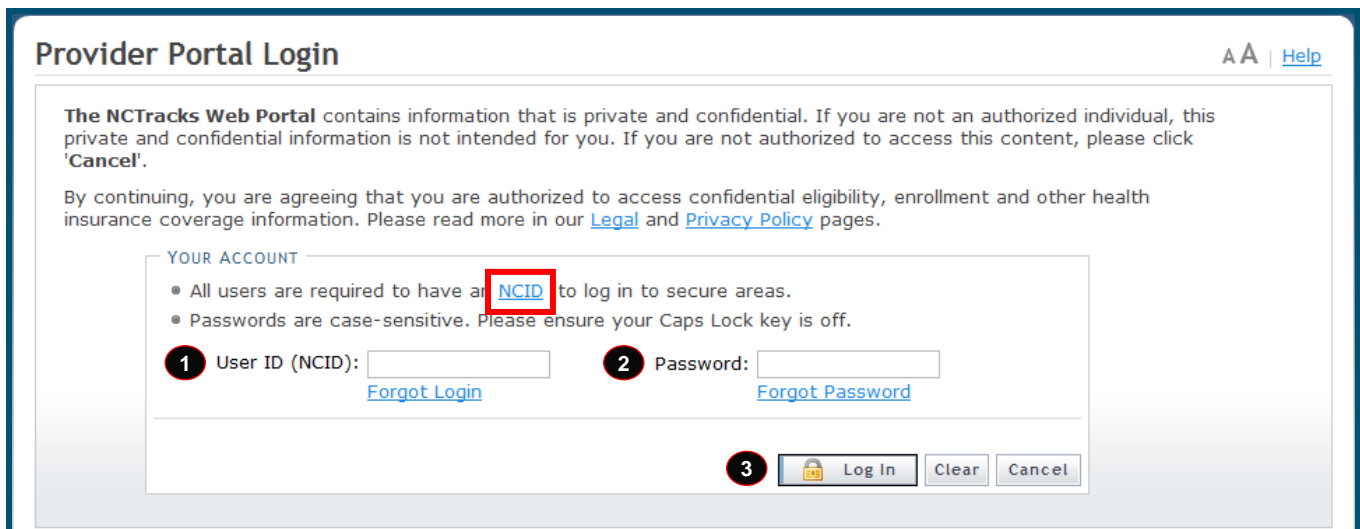


Exhibit 4. Provider Portal Login Screen

Step	Action
1.	User ID (NCID): Enter your User ID (NCID) .
2.	Password: Enter your password.
3.	Click the Log In button.

Provider Portal

Eligibility
Prior Approval
Claims
Referral
Administration
Code Search
Payment
Trading Partner
Consent Forms

Home

Message Center for Sue Jones

Subscription Preferences
Print
A A
Help

Announcements

Date: Jul 27, 2012 12:00:00 AM Attention: **Some Users**

July 27, 2012, Update... DMA and the DHHS Controller's Office are suspending mandatory cost reporting for providers of enhanced mental health services, community based personal care services, adult care home personal care and special care services, CAP/MR-DD services, and residential treatment facility services.

This change was made for the demo group....

[More Announcements](#)

Quick Links

- [Provider Training](#)
- [Department of Health and Human Services](#)
- [Division of Health Service Regulation](#)
- [DMH/DD/SAS](#)
- [Division of Public Health](#)
- [Division of Medical Assistance](#)
- [Office of Rural Health and Community Care](#)
- [DMA \(Health Check\)](#)
- [CCNC/CA \(Managed Care\)](#)
- [ABOUT](#)

WELCOME

OFFICE ADMINISTRATORS

ENROLLMENT

Provider Training

User Administration

Status and Management

1

Step	Action
1.	On the Secure Provider Portal home page, select Office Administrators/User Administration .

[illegible]

3.4 NEW GROUP SETUP SCREEN

Office Administrators use the New Group Setup process to set up Provider Groups for Administrative Users to represent. As mentioned, they should create groups that represent logical collections of providers within an organization. Administrative Users are assigned to do business for one or more of these groups.

From the **User Administration** screen, the user can access the **New Group Setup** screen in several ways:

- ❖ Selecting **New Group Setup** from the Administration tab
- ❖ Selecting the Getting Started/New Group Wizard icon
- ❖ Selecting **New Group Setup** in the User Administration menu on the left side of the home page

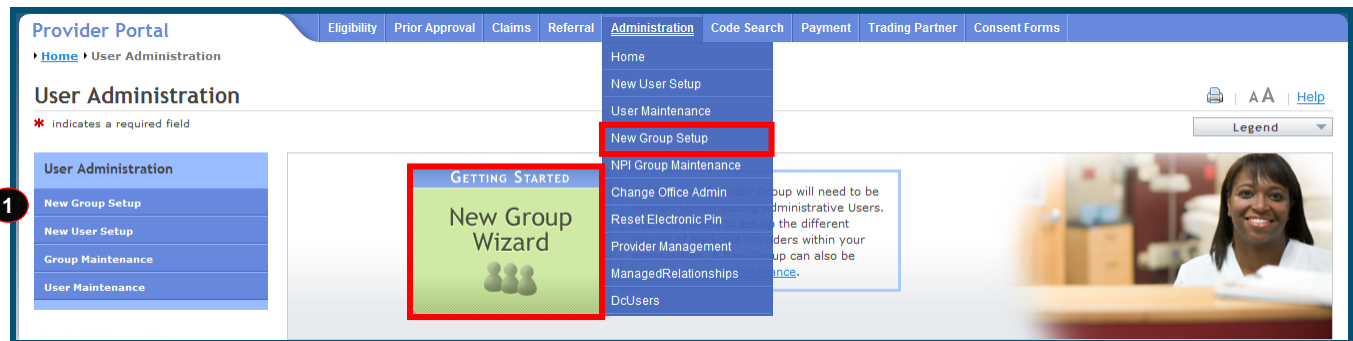


Exhibit 7. User Administration Screen

Step	Action
1	In the User Administration menu, select New Group Setup .

NOTES:

3.4.1 New Group Setup Screen – Step 1 of 2

The **New Group Setup** screen is where the user begins setting up New Groups. In the **Step 1 of 2 – Create New Provider Group Name** section, the user enters the group name and description.

Exhibit 8. New Group Setup Screen: Step 1 of 2

Step	Action
1.	Group Name: Enter the name of the new provider group.
2.	Group Description: Enter the description of the new provider group.
3.	Click Next button to continue to the second setup screen. Note: If necessary, click the Clear button to erase the entries or click the Cancel button to cancel all entries and return to the previous screen.

NOTES:

3.4.2 New Group Setup Screen – Step 2 of 2

In the **Step 2 of 2 – Assign NPIs to Provider Group** section, the Office Administrator selects NPIs from the Available NPIs section and assigns them to the group. The Available NPIs are NPIs associated with the Office Administrator's accounts in NCTracks via enrollment, re-enrollment, currently enrolled provider NCTracks registration, etc.

Exhibit 9. New Group Setup Screen: Step 2 of 2

Step	Action
1	Available NPIs: Select the appropriate NPI(s) .
2	<p>Click the Add button to add it to the Selected NPIs section.</p> <ul style="list-style-type: none"> To choose more than one NPI at a time, you would select the appropriate NPIs while holding down the <CTRL> key. Then, you would click the Add button to add them. To add all the NPIs listed in the Available NPIs section, you would click the Add All button. <p>Note: If necessary, you would click the Previous button to return to the previous screen.</p>
3	Click the Submit button.

NOTES:

3.5 SUBMISSION CONFIRMATION SCREEN

After clicking the Submit button, the **Submission Confirmation** screen displays. The name of the new Group the user added displays to the right of the green check mark.

Other functions are also available on this screen. Notice that users can conduct a search in the **Search Criteria** section or add a new group in the **New Group** section.

To return to the **User Administration** screen, click User Administration in the breadcrumb trail.

Exhibit 10. Submission Confirmation Screen

NOTES:

4.0 Group Maintenance

4.1 INTRODUCTION

On the **User Administration** screen, Office Administrators can use the Group Maintenance link to access the **Group Maintenance** screen and then update NPIs/Atypical IDs for an existing group (or add a new group).

4.2 USER ADMINISTRATION SCREEN

From the User Administration screen, the user accesses the **Group Maintenance** screen.

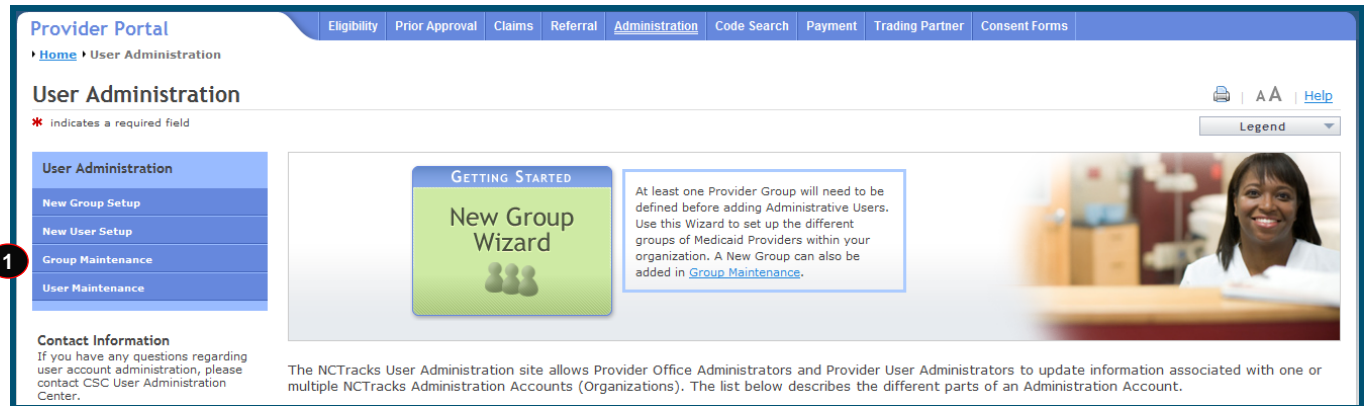


Exhibit 11. User Administration Screen

Step	Action
1	In the User Administration menu, select Group Maintenance .

NOTES:

4.3 GROUP MAINTENANCE SCREEN

The **Group Maintenance** screen displays. This is where users begin searching for the group(s) they need to edit.

4.3.1 Group Maintenance Screen – Search Criteria

On the **Group Maintenance** screen, specify the Group Name or Group Description to locate a specific group. If a user leaves both fields blank, a list of all groups associated with the user (as the Office Administrator) display. A user can also search by typing a portion of the name in the Group Name field; all matching results will display.

The screenshot shows the 'Group Maintenance' screen in the 'Provider Portal'. The 'SEARCH CRITERIA' section is highlighted with a red box. It contains two input fields: 'Group Name' (labeled with a red circle 1) and 'Group Description' (labeled with a red circle 2). A 'Search' button (labeled with a red circle 3) is located to the right of these fields. Below the search criteria is a 'NEW GROUP' section with two input fields: 'Group Name' (marked with a red asterisk) and 'Group Description' (marked with a red asterisk). An 'Add' button is located at the bottom right of the 'NEW GROUP' section.

Exhibit 12. Group Maintenance Screen: Search Criteria

Step	Action
1	Group Name: Enter the group name .
2	Group Description: Enter the group description .
3	Click the Search button.

NOTES:

4.3.2 Group Maintenance Screen – Search Results

The results display in the **Search Results** section of the screen. If a user searches by typing a portion of the name, all matching results display.

Provider Portal | Eligibility | Prior Approval | Claims | Referral | Administration | Code Search | Payment | Trading Partner | Consent Forms

Home > User Administration > Group Maintenance

Group Maintenance

* Indicates a required field

SEARCH CRITERIA

Use the following search criteria to find a specific Group, or both fields can be left blank to return a list of all groups associated with the Administration Account displayed above. Group profiles can be updated by choosing a row from the results list.

Group Name:

Group Description:

SEARCH RESULTS

Group Name	Group Description	Administration Account
ABC Pediatrics	ABC Hospital - Pediatrics Department	

Page: 1 of 1

NEW GROUP

You may use the User Maintenance interface to add a New Group below. Enter New Group information below and click 'Add' to complete your submission. The New Group will be added to the Administration Account displayed above.

If you prefer, the [New Group Wizard](#) can also be used to add a New Group.

* Group Name:

* Group Description:

Exhibit 13. Group Maintenance Screen: Search Results

Step	Action
1	In the Group Name column, click the appropriate group link.

NOTES:

4.3.3 Group Maintenance Screen – Add/Remove NPIs

Both the Group Name and Group Description display under the Add/Remove NPIs heading. The user should review the name and group to ensure they are making edits to the correct group. If not, they should click the Cancel button to return to the previous screen and initiate another search.

Note that the currently selected NPIs for this group display in the **Selected NPIs** section.

Exhibit 14. Group Maintenance Screen: Add/Remove NPIs

Step	Action
1	Available NPIs: Select the appropriate NPI(s) .
2	<p>Click the Add button to add it to the Selected NPIs section.</p> <ul style="list-style-type: none"> To choose more than one NPI at a time, you would select the appropriate NPIs while holding down the <CTRL> key. Then, you would click the Add button. To add all the NPIs listed in the Available NPIs section, you would click the Add All button. <p>To remove an NPI:</p> <ul style="list-style-type: none"> Select the appropriate NPI and you would click the Remove button to remove it from the Selected NPIs section. To choose more than one NPI at a time, you would select the appropriate NPIs while holding down the <CTRL> key. Then, you would click the Remove button. To remove all the NPIs listed in the Available NPIs section, you would click the Remove All button.
3	Click the Update button.

4.4 SUBMISSION CONFIRMATION SCREEN

After clicking the Update button, the **Submission Confirmation** screen displays. The name of the updated Group displays to the right of the green check mark. If necessary, users can conduct another group search from this screen.


Provider Portal

Eligibility | Prior Approval | Claims | Referral | Administration | Code Search | Payment | Trading Partner | Consent Forms

[Home](#) | [User Administration](#) | Group Maintenance

Group Maintenance

* Indicates a required field



Submission Confirmation

Updated the Group: ABC Pediatrics

SEARCH CRITERIA

Use the following search criteria to find a specific Group, or both fields can be left blank to return a list of all groups associated with the Administration Account displayed above. Group profiles can be updated by choosing a row from the results list.

Group Name:

Group Description:

Search

Clear

Exhibit 15. Submission Confirmation Screen

NOTES:

[illegible]



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5.0 Creating New User without a PIN

5.1 INTRODUCTION

There are three types of users:

- ❖ Office Administrators
- ❖ User Administrators
- ❖ General Users

Office Administrators:

- ❖ Can add, maintain, and delete User Administrators and General Users
- ❖ Can add and edit User Groups

User Administrators:

- ❖ Can add, maintain, and delete General Users
- ❖ It is highly suggested that each Office Administrator add at least one User Administrator because the User Administrator can serve as a backup in case the Office Administrator is unavailable.

General Users:

- ❖ Can be assigned roles for the duties they have access to perform

The process for creating new General Users or User Administrators is very similar to that for creating new groups.

NOTES:

5.2 ADDING A NEW USER WITHOUT A PIN

From the **User Administration** screen, access the **New User Setup** screen by:

- ❖ Selecting New User Setup from the **Administration** tab, or
- ❖ Selecting New User Setup in the **User Administration** menu

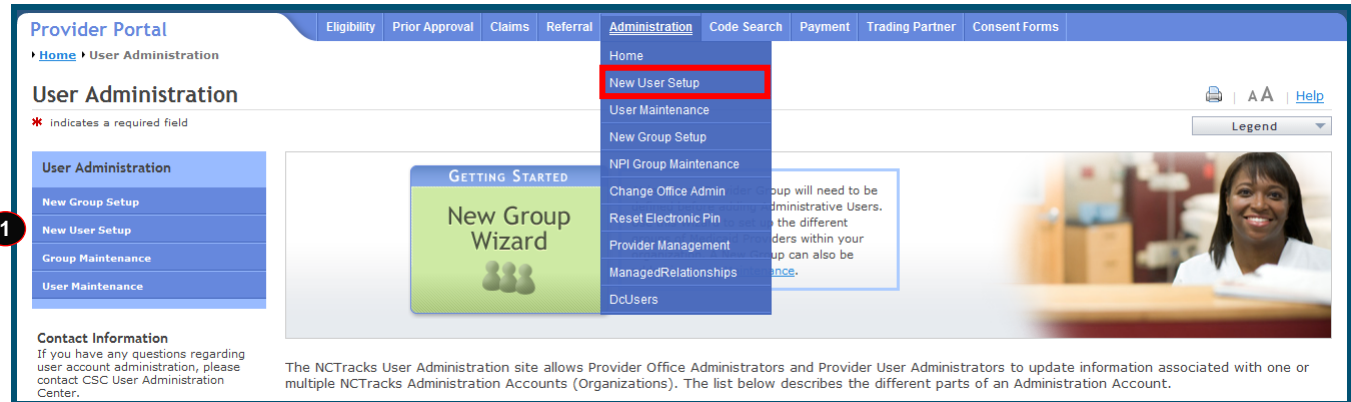


Exhibit 16. User Administration Screen

Step	Action
1	In the User Administration menu, select New User Setup .

NOTES:

[illegible]

5.3 NEW USER SETUP SCREEN

We'll begin on the **New User Setup** screen.

5.3.1 New User Setup Screen – Step 1 of 3

In the **Step 1 of 3 – Create a New User** section, enter as much information as known. Red asterisks identify all required fields.

Exhibit 17. New User Setup Screen: Step 1 of 3

Step	Action
1	User ID (NCID): Enter the NCID .
2	Click Validate button. The name and email address pre-fill from the NCID website. Note: You may edit the fields on the screen, but this will not update the information you have on file with NCID.
3	User Type: Select the type from the drop-down list.
4	Click the Next button.

NOTES:

5.3.2 New User Setup Screen – Step 2 of 3

In the **Step 2 of 3 – Assign Provider Groups to the New User** section, select the provider groups for the New User.

Exhibit 18. New User Setup Screen: Step 2 of 3

Step	Action
1.	Available Groups: Select the appropriate group(s) .
2.	Click Add button to it to the Selected Groups section. <ul style="list-style-type: none"> To choose more than one group at a time, you would select the appropriate groups while holding down the <CTRL> key. Then, you would click the Add button to add them. To add all the groups listed in the Available Groups section, you would click the Add All button.
3.	Click the Next button.

NOTES:

5.3.3 New User Setup Screen – Step 3 of 3

In the **Step 3 of 3 – Assign Access Roles to the New User** section, select the access roles for the New User from the **Available Roles** section. The user's role(s) define which parts of the NCTracks Provider Portal the user can access.

The user's roles and descriptions are:

- ❖ Claims – can verify patient and search for claim status
- ❖ Claims Batch – can batch claims
- ❖ Claims Submit – can submit claims
- ❖ Eligibility Batch – can batch results
- ❖ Prior Approval Submit – can submit a Prior Approval
- ❖ Prior Approvals – can request inquiry and approval status
- ❖ Referrals – can submit a referral
- ❖ Remittance – is a remittance user
- ❖ Supervisor Access – has access to all roles
- ❖ Training – has training access
- ❖ User Administrator – can perform user maintenance
- ❖ Check Recipient Eligibility – can check and submit recipient eligibility
- ❖ Eligibility – can inquire about user eligibility

NOTES:

[illegible]

Select the role(s) the user needs to perform his/her job.

Provider Portal | Eligibility | Prior Approval | Claims | Referral | Code Search | Enrollment | **Administration** | Trading Partner | Payment | Consent Forms

Home | **User Administration** | New User Setup

New User Setup | Legend

* Indicates a required field

STEP 3 OF 3 - ASSIGN ACCESS ROLES TO THE NEW USER

- Select the access role(s) from the available roles for this New User (**chrisevans304**)
- Click 'Submit' when you are ready to activate the New User you have created.

Access Rights

Available Roles

- Check Recipient Eligibility
- Claims Submit
- Claims Batch
- Claims

Assigned Roles

Empty

Roles Legend

Buttons: Add, Add All, Remove, Remove All, Show Assigned Role Legend

Navigation: Previous, Submit, Clear, Cancel

Exhibit 19. New User Setup Screen: Step 3 of 3

Step	Action
1	Available Roles: Select the appropriate role(s)
2	Click the Add button to add it to the Assigned Roles section. <ul style="list-style-type: none"> To choose more than one role at a time, you would select the appropriate roles while holding down the <CTRL> key. Then, you would click the Add button to add them. To add all the roles listed in the Available Roles section, you would click the Add All button.
3	Click the Submit button.

NOTES:

5.4 Submission Confirmation Screen

After clicking the Submit button, the **Submission Confirmation** screen displays. The name of the new General User (User NCID) displays to the right of the green check mark.


Provider Portal

Eligibility | Prior Approval | Claims | Referral | Administration | Code Search | Payment | Trading Partner | Consent Forms

[Home](#) > [User Administration](#) > User Maintenance

User Maintenance

* indicates a required field



Submission Confirmation

Added the User NCID: bettyjackson2013

SEARCH CRITERIA

Use the following search criteria to find a User. User profiles can be updated by choosing a row from the results list by clicking User ID (NCID) link to continue.

Last Name:

Email:

User ID (NCID):

User Status: Choose

Provider Group: Choose

Search

Clear

Exhibit 20. Submission Confirmation Screen

NOTES:

[illegible]



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6.0 Creating New User with PIN

6.1 INTRODUCTION

All owners and managing employees for a provider can have access to update a provider's information (See Provider Applications Instructor-led training) for more information about the Manage Change Request application).

If an owner or managing employee wishes to become a user, he/she will be sent an Electronic Signature PIN to the email address on file so he/she can electronically sign the applications. Having a PIN allows a user to submit secure forms in the NCTracks Provider Portal.

6.2 ADDING A NEW USER WITH PIN

From the **User Administration** menu, select New User Setup.

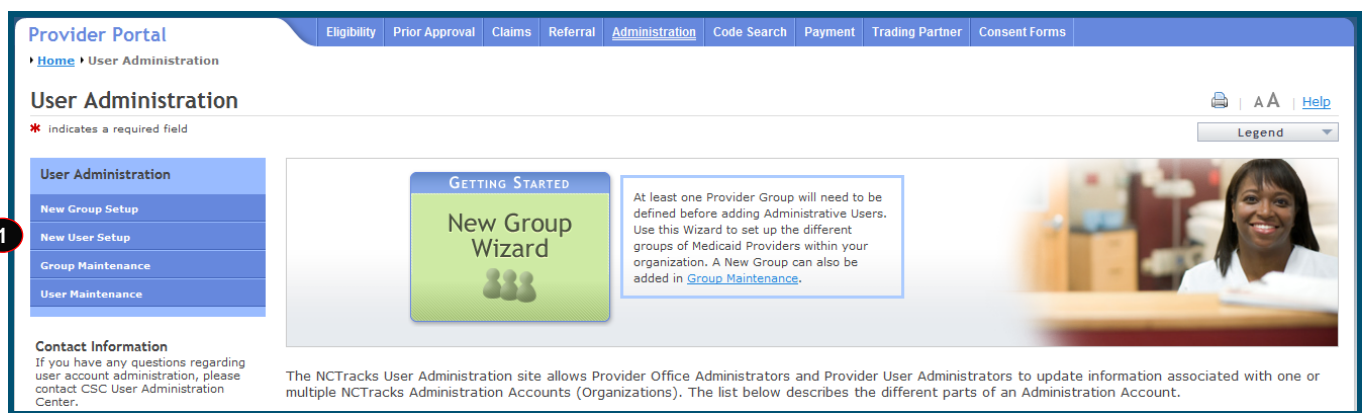


Exhibit 21. User Administration Screen

Step	Action
1	In the User Administration menu, select New User Setup .

NOTES:

6.3 NEW USER SETUP SCREEN

Adding a New User (who has a PIN) is a four-step process.

6.3.1 New User Setup Screen – Step 1 of 4

On this screen, you will answer the “Is the New User an owner, or do they have a managing relationship with the Administration Account NPI?” question. Notice how this screen does not display when setting up a user without a PIN.

Exhibit 22. New User Setup Screen: Step 1 of 4

Step	Action
1.	<p>“Is the New User an owner, or do they have a managing relationship with the Administration Account NPI?” Click the Yes radio button.</p> <p>Note: If the user is not an owner or does not have a managing relationship with the Administration Account NPI, you would click the No radio button.</p>

NOTES:

After selecting the Yes radio button, the section expands as shown below:

Exhibit 23. New User Setup Screen: Owner/Managing Employee

Step	Action
2.	Owner/Managing Employee: Select the appropriate employee name from the drop-down list.
3.	Click the Next button.

Note: The screen in Exhibit 24 would display when a User Administrator is a User Administrator for *more than one* Office Administrator. They would select the appropriate Office Administrator from the drop-down list.

Exhibit 24. New User Setup Screen: Step 1 of 4 (Multiple Office Administrators)

6.3.2 New User Setup Screen – Step 2 of 4

Complete the **Step 2 of 4 – Create a New User** section. You may edit the fields, but note that editing the fields here does NOT update the information you have on file with NCID.

Provider Portal | Eligibility | Prior Approval | Claims | Referral | Administration | Code Search | Payment | Trading Partner | Consent Forms

Home > User Administration > New User Setup

New User Setup

* Indicates a required field

STEP 2 OF 4- CREATE A NEW USER

- Complete or modify required information.
- Enter the 'NCID' and click 'Validate' to populate the email address on record with NCID. A new email address may be entered after the NCID is validated.

*A User Administrator has access to the NCTracks User Administration Site, and can add, maintain, and delete General Users.

* Last Name: * First Name:

Middle Initial: Suffix: Choose

* Email: Phone #: (000) 000-0000 ext.

1 * User ID (NCID): Validate Get NCID 3 * User Type: Choose

2

4 Next

Clear Cancel

Exhibit 25. New User Setup Screen: Step 2 of 4

Step	Action
1.	User ID (NCID): Enter the NCID .
2.	Click Validate button to verify that the user has an NCID.
3.	User Type: Select User Administrator or General User from the drop-down list.
4.	Click the Next button.

NOTES:

6.3.3 New User Setup Screen – Step 3 of 4

In the **Step 3 of 4 – Assign Provider Groups to the New User** section, select the provider groups for which you want the new User Administrator to do business.

Exhibit 26. New User Setup Screen: Step 3 of 4

Step	Action
1	Available Groups: Select the appropriate group(s)
2	<p>Click the Add button to add it to the Selected Groups section.</p> <ul style="list-style-type: none"> To choose more than one group at a time, you would select the appropriate groups while holding down the <CTRL> key. Then, you would click the Add button to add them. To add all the groups listed in the Available Groups section, you would click the Add All button. Note: After selecting the groups, you can click the Show Assigned Groups button to display the members in each selected group.
3	Click the Next button.

NOTES:

6.3.4 New User Setup Screen – Step 4 of 4

In the **Step 4 of 4 – Assign Access Roles to the New User** section, select the Access Rights/Roles for the User Administrator. Remember that access roles provide access to the NCTracks sections required for users to do their job.

Exhibit 27. New User Setup Screen: Step 4 of 4

Step	Action
1	Available Roles: Select the appropriate role(s) .
2	Click the Add button to add it to the Assigned Roles section. <ul style="list-style-type: none"> To choose more than one role at a time, you would select the appropriate roles while holding down the <CTRL> key. Then, you would click the Add button to add them. To add all the roles listed in the Available Roles section, you would click the Add All button.
3	Click the Submit button.

Exhibit 28 shows an example of the Roles Legend, which displays after clicking the Show Assigned Role Legend button. In this example, the assigned roles for this user are Check Recipient Eligibility, Claims Submit, and User Admin.

Exhibit 28. Roles Legend

7.0 User Maintenance

7.1 INTRODUCTION

Use the User Maintenance function to make updates to users and user information.

7.2 ACCESS USER MAINTENANCE

On the **User Administration** screen, use the User Maintenance link to update the Security Rights, Provider Groups, or Status Information for an existing user.

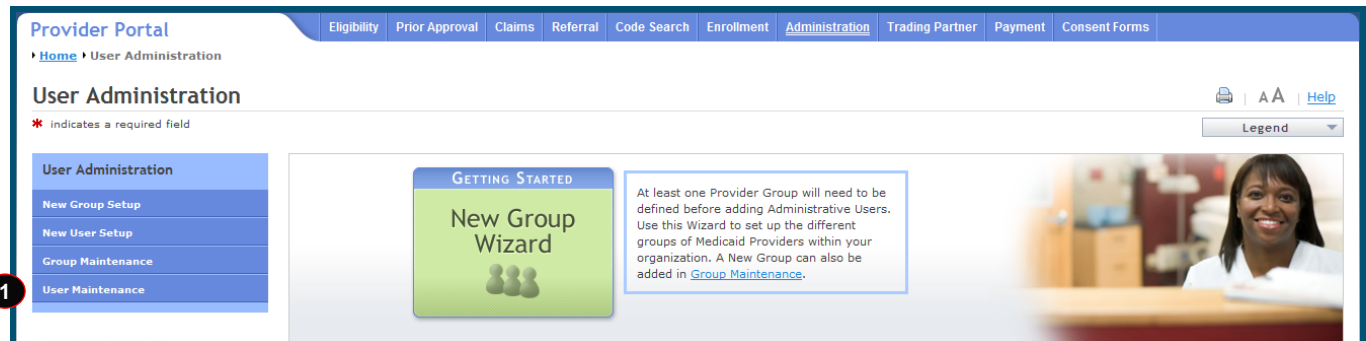


Exhibit 30. User Administration Screen

Step	Action
1	In the User Administration menu, select User Maintenance .

NOTES:

7.3 USER MAINTENANCE SCREEN

Enter the appropriate search criteria on the **User Maintenance** screen.

7.3.1 User Maintenance Screen – Search Criteria

On this screen, search for users by last name, email address, NCID, user status, or provider group. If you click the Search button without specifying any criteria, all users associated with your groups (as an Office Administrator) display.

Exhibit 31. User Maintenance Screen: Search Criteria

Step	Action
1	In the Search Criteria section, complete any of the following fields to search for a user: <ul style="list-style-type: none"> • Last Name • User ID (NCID) • Provider Group • Email • User Status
2	Click the Search button.

NOTES:

Note: The screen below would display when a User Administrator is a User Administrator for *more than one* Office Administrator. They would enter their search criteria and then select the appropriate Office Administrator from the drop-down list.

The screenshot shows the 'User Maintenance' screen in the Provider Portal. The 'SEARCH CRITERIA' section includes fields for Last Name, Email, User ID (NCID), and Provider Group. A red box highlights the 'Choose the Office Administrator which you will be acting on behalf of:' dropdown menu, which currently shows 'JONES MARIA'. Below the search criteria is a 'NEW USER' section with a 'New User Setup' button.

Exhibit 32. User Maintenance Screen: Search Criteria (Multiple Office Administrators)

NOTES:

7.4 EDIT USER SCREEN

The **Edit User** screen displays. On this screen, you will manage PINs (disable, enable, and reset), provider groups, and access rights. If necessary, you can edit the information in the top section of the screen.

Provider Portal | Eligibility | Prior Approval | Claims | Referral | Code Search | Enrollment | **Administration** | Trading Partner | Payment | Consent Forms

Home > User Administration > User Maintenance > Edit User

Edit User

* indicates a required field

User ID (NCID): ruthedwards2013 * User Type: User Administrator * User Status: Active

* Last Name: edwards * First Name: ruth

Middle Initial: Suffix: Choose

* Email: ruthedwards2013@gm Phone #: (000) 000-0000 ext.

PIN MANAGEMENT	
NPI/Atypical ID	Disable PIN
1. 132601xxxx	N-NO
2. 132601xxxx	N-NO
3. 132601xxxx	N-NO
4. 132601xxxx	N-NO
5. 132601xxxx	N-NO
6. 132601xxxx	N-NO
7. 132601xxxx	N-NO
8. 132601xxxx	N-NO
9. 132601xxxx	N-NO

Exhibit 34. Edit User Screen

7.4.1 Edit User Screen – PIN Management Section (Disable PIN)

If the Office Administrator or User Administrator determines that a user should no longer have PIN access (to the NPI record), disable the PIN. In the **PIN Management** section, follow the steps below to disable the user's PIN.

1 132601xxxx

NPI/Atypical ID	Disable PIN
1. 132601xxxx	N-NO
2. 132601xxxx	N-NO
3. 132601xxxx	N-NO
4. 132601xxxx	N-NO
5. 132601xxxx	N-NO
6. 132601xxxx	N-NO
7. 132601xxxx	N-NO
8. 132601xxxx	N-NO
9. 132601xxxx	N-NO

2 YES

3 Update Cancel

Exhibit 35. Edit User Screen: PIN Management (Disable PIN)

Step	Action
1	NPI/Atypical ID: Select the PIN you want to disable. In this example, notice 132601xxxx was selected.
2	Disable PIN: Select Yes from the drop-down list.
3	Click the Update button.

7.4.2 Edit User Screen – PIN Management Section (Enable PIN)

If PIN rights were disabled at one time and the user is now able to have PIN access (to the NPI record), enable the PIN. In the **PIN Management** section, follow the steps below to enable a user's PIN.

The screenshot shows the 'PIN MANAGEMENT' section of a software interface. A table lists various PINs under the header 'NPI/Atypical ID'. The first row is highlighted, and a dropdown menu is open next to it, showing options 'N-NO' (selected), 'N-YES', and 'Y-YES'. To the right of the dropdown are 'Update' and 'Cancel' buttons. Red circles with numbers 1, 2, and 3 are overlaid on the image to indicate the steps: 1 points to the first row, 2 points to the dropdown menu, and 3 points to the 'Update' button.

PIN MANAGEMENT	
NPI/Atypical ID	Disable PIN
132601XXXX	N-NO (selected) N-YES Y-YES [Update] [Cancel]
2. 132601XXXX	N-NO
3. 132601XXXX	N-NO
4. 132601XXXX	N-NO
5. 132601XXXX	N-NO
6. 132601XXXX	N-NO
7. 132601XXXX	N-NO
8. 132601XXXX	N-NO

Exhibit 36. Edit User Screen: PIN Management (Enable PIN)

Step	Action
1	NPI/Atypical ID: Select the PIN you want to enable. In this example, notice 132601xxxx was selected.
2	Disable PIN: Select No from the drop-down list.
3	Click the Update button.

NOTES:

[illegible]

On the **Edit User** screen, scroll down to the **Reset Electronic Signature PIN** section. Complete the section in order for a new PIN to be created and e-mailed to the user.

Exhibit 37. Edit User Screen: Reset Electronic Signature PIN

NOTES:

[illegible]

7.4.4 Edit User Screen – Provider Groups Section

Scroll down the **Edit User** screen to the **Provider Groups** section. Here, you can make any necessary changes to the user's provider groups.

Exhibit 38. Edit User Screen: Provider Groups

Step	Action
1	Available Groups: Select the group(s) .
2	<p>Click the Add button to add it to the Selected Groups section.</p> <ul style="list-style-type: none"> To choose more than one group at a time, you would select the appropriate groups while holding down the <CTRL> key. Then, you would click the Add button to add them. To add all the groups listed in the Available Groups section, you would click the Add All button. <p>To remove a group:</p> <ul style="list-style-type: none"> Select the appropriate group and you would click the Remove button to remove it from the Selected Groups section. To choose more than one group at a time, you would select the appropriate group while holding down the <CTRL> key. Then, you would click the Remove button. To remove all the groups listed in the Available Groups section, you would click the Remove All button.
3	Click the Save button

NOTES:

7.4.5 Edit User Screen – Access Rights Section

Access rights determine which information a user can view. Make the necessary changes to the Access Rights in this section. The process is the same as that for updating Provider Groups.

Exhibit 39. Edit User Screen: Access Rights

Step	Action
1	Available Roles: Select the role(s)
2	<p>Click the Add button to add it to the Assigned Roles section.</p> <ul style="list-style-type: none"> To choose more than one role at a time, you would select the appropriate roles while holding down the <CTRL> key. Then, you would click the Add button to add them. To add all the roles listed in the Available Roles section, you would click the Add All button. <p>To remove a role:</p> <ul style="list-style-type: none"> Select the appropriate role and you would click the Remove button to remove it from the Assigned Roles section. To choose more than one role at a time, you would select the appropriate role while holding down the <CTRL> key. Then, you would click the Remove button. To remove all the roles listed in the Assigned Roles section, you would click the Remove All button.
3	Click the Save button.

NOTES:

7.4.6 Edit User Screen – Audit History Section

At the bottom of the **Edit User** screen, notice that an **Audit History** section displays previous edits made for the selected user as well as the date/time for each edit.

- AUDIT HISTORY					
Administrator NCID	NCID Modified	Modification	Before	After	Date of Modification
tstClaims3	terryclark2013	Add- Roles		Claims Submit Training	02/21/2013 18:10:30
tstClaims3	terryclark2013	Add - Groups		ABC Cardiology ABC Diagnostic Imaging ABC Elderly Services	02/21/2013 18:10:30
tstClaims3	terryclark2013	Add- User Demographics		Terry Clark terryclark0000@gmail.com 0000000000 Ext: General User	02/21/2013 18:10:30

Exhibit 40. Edit User Screen: Audit History

NOTES:

[illegible]



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8.0 Resources

For more information, please refer to the Office Admin Functions (CBT).

For further clarification or guidance on specific Policies, please access the North Carolina Office of Medicaid Management Information System Services, (OMMISS) at: <http://www.ncmmis.ncdhhs.gov>



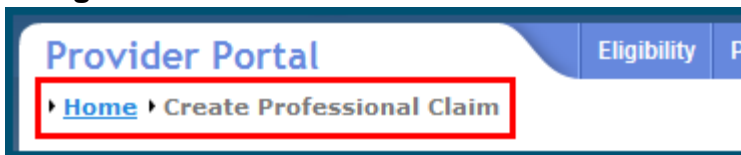
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Addendum A. Help System

The major forms of help in the NCMMIS NCTracks system are as follows:

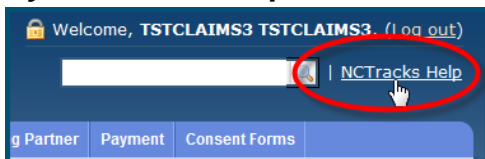
- ❖ Navigational breadcrumbs
- ❖ System-Level Help: Indicated by the "NCTracks Help" link on each page
- ❖ Page-Level Help: Indicated by the " Help" link above the Legend
- ❖ Legend
- ❖ Data/Section Group Help: Indicated by a question mark (?)
- ❖ Hover over or Tooltip Help on form elements

Navigational Breadcrumb



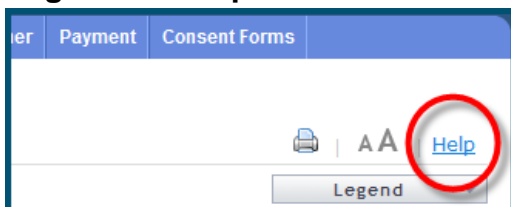
A breadcrumb trail is a navigational tool that shows the user the path of screens they have visited from the home page. This breadcrumb consists of links so the user can return to specific screens on this path.

System Level Help



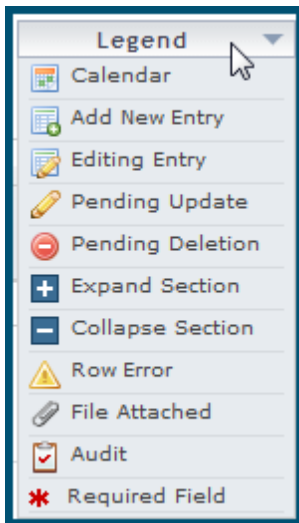
The System Help link opens a new window with the complete table of contents for a given user's account privileges. The System Level Help link, "NCTracks Help," will show up at the top right of any secure portal page or web application form page that contains Page Level and/or Data/Form Group Help.

Page Level Help



Page Level Help opens a modal window with all of the Data/Form Group help topics for the current page. The Page Level Help link shows across from the page title of any web application form page.

Form Legend

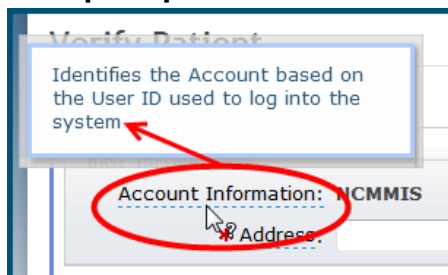


A legend of all helpful icons is presented on pages as needed to explain the relevant meanings. This helps the user become familiar with any new icon representations in context with the form or page as it is used. Move your mouse over the Legend icon to open list.

Data / Section Group Help

Data/Section Group Help targets the same modal window as Page Level help, but also targets specific form information associated with the Help link the user clicked. Data/Form Group Help shows up as a question mark (?).

Tooltip Help



Tooltip help is available via a popup box that appears slightly above the page element when a user hovers the cursor over the element. Text with an available tooltip has a dashed underline.